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Chain Store Age EXECUTIVE

with Shopping Center Age

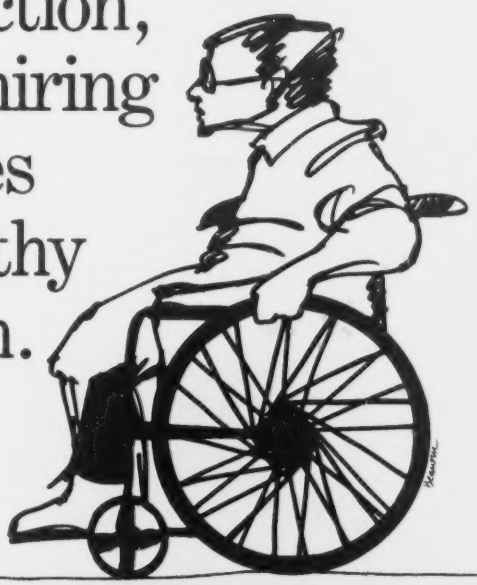
The newsmagazine for retail management

July 1990 ISSUED IN TWO SECTIONS

PHYSICAL SUPPORTS CENSUS

WITH ACCESS FOR ALL

Expensive legislation: Americans with Disabilities Act could cost millions in building improvements, new construction, revamped hiring procedures and lengthy litigation.



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COSTS UNDER CONTROL

Retail companies are keeping a tight lid on construction, fixturing and maintenance costs. The cost of building the average supermarket building shell, for example, gained only 10% (from $1.3 million to $1.4 million) in the last five years. Construction cost for a

PHYSICAL SUPPORTS CENSUS

SURVEY RESULTS

Discount

Existing stores (average gross sq. ft.): 67,765 sq. ft.
Existing stores (average selling space): 54,144 sq. ft.
Stores opened 1989 (average gross sq. ft.): 62,600 sq. ft.
Stores opened 1989 (average selling space): 51,520 sq. ft.
Cost to erect building shell 1989: $21.31 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

Drug

Existing stores (average gross sq. ft.): 16,008 sq. ft.
Existing stores (average selling space): 12,934 sq. ft.
Stores opened 1989 (average gross sq. ft.): 13,643 sq. ft.
Stores opened 1989 (average selling space): 10,833 sq. ft.
Cost to erect building shell 1989: $34.32 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

Supermarket

Existing stores (average gross sq. ft.): 32,295 sq. ft.
Existing stores (average selling space): 24,383 sq. ft.
Stores opened 1989 (average gross sq. ft.): 41,288 sq. ft.
Stores opened 1989 (average selling space): 29,521 sq. ft.
Cost to erect building shell 1989: $34.09 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

department store shell increased a more modest 8%. For comparison, retail sales (excluding automotive) during the same period grew 31%, according to the U.S. Department of Commerce.

These are some of the conclusions of the *Chain Store Age Executive* Physical Supports Census, an exclusive poll of major retail companies that annually surveys construction, fixturing and maintenance costs.

The poll, conducted by Chicago-based Leo J. Shapiro & Associates, questioned officials from 118 retail companies, about equally divided among supermarket, department, drug, discount, apparel specialty and home center operators.

Companies that participated in this year's Physical Supports Census operate 12,987 stores with sales that exceed $40.8 billion.

Included among the respondents are premier companies in every retail category: Vons, Winn-Dixie, Bloomingdale's, Dayton Hudson, Walgreens, F&M Distributors, The Gap, Edison Bros., Venture and Roses all participated in the poll.

Among major physical support systems in the census, only floor maintenance costs have outpaced the rate of sales gains in the last five years. According to the survey, the cost of floor maintenance has jumped from an average 21¢ per square foot in 1985 to 59¢ today.

The price tag for interior signage, in contrast, has gained a more modest 30%, from 36¢ per square foot five years ago to 47¢ in 1990.

Cost for heating, ventilation and air conditioning systems have hardly increased at all. In 1985 respondents in the Physical Supports Census reported spending $1.39 per square foot for HVAC. In the current poll, they say costs have edged up to $1.48—an increase of only 8%.

Interior lighting costs, meanwhile, have actually dropped in the last five years. According to the survey, retailers spent an average $1.20 per square foot for lighting in 1985. This year the price has dropped to $1.11.

Not surprisingly, lighting costs were highest in apparel specialty stores ($1.92). Following were drug ($1.03), department ($1.03) and discount stores (94¢).

Other changes noted in the poll include some significant differences in construction preferences. Retailers in the most recent survey report using single-ply membrane roofs with the greatest frequency.

Five years ago, retailers said that they used built-up roofs most frequently. Fabric roofs hardly gained a mention in the 1985 Physical Supports Census. In the current poll, 10% of the companies use them.

Just as in the 1985 survey, carpet and vinyl are the top flooring choices. Making strong gains, however, are concrete, quarry tile, hardwood, terrazzo and marble.

As a rule, stores are smaller than they were five years ago. The average supermarket, says the poll, now measures 32,295 sq. ft. In 1985, the typical supermarket was 39,390 sq. ft.

Other retail formats experienced similar downsizing. In the five-year period, the average department store dropped to 133,409 sq. ft. from 138,920 sq. ft. Discount stores, which measured 71,720 sq. ft. in 1985, are now a more trim 67,765 sq. ft. ■

Home Center

Existing stores (average gross sq. ft.): 27,779 sq. ft.
Existing stores (average selling space): 22,890 sq. ft.
Stores opened 1989 (average gross sq. ft.): 31,147 sq. ft.
Stores opened 1989 (average selling space): 26,568 sq. ft.
Cost to erect building shell 1989: $27.71 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

Department

Existing stores (average gross sq. ft.): 133,409 sq. ft.
Existing stores (average selling space): 101,791 sq. ft.
Stores opened 1989 (average gross sq. ft.): 141,909 sq. ft.
Stores opened 1989 (average selling space): 111,966 sq. ft.
Cost to erect building shell 1989: $33.76 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

Apparel Specialty

Existing stores (average gross sq. ft.): 10,068 sq. ft.
Existing stores (average selling space): 8,457 sq. ft.
Stores opened 1989 (average gross sq. ft.): 6,786 sq. ft.
Stores opened 1989 (average selling space): 5,822 sq. ft.
Cost to erect building shell 1989: $42.96 per square foot

Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

WACCAMAW PUTS PRODUCTS IN BEST LIGHT

ILLUMINATION LEVEL OF PRISMATIC FIXTURES BRINGS OUT TRUE COLORS

Last year, when Waccamaw opened a home decor superstore in Knoxville, Tenn., the retailer installed Holophane prismatic glass lighting fixtures as an alternative to a more commonly used fluorescent system.

Although costs figured into the decision, appearance and lighting uniformity were the most important considerations, says Paul Reynolds, Waccamaw corporate engineer.

"Our costs are actually less with the prismatic fixtures, because we needed fewer of them than we would have needed if we had used fluorescent," Reynolds explains.

"If we had needed the same number of lamps, the prismatics would have cost more. That wasn't necessary because the illumination level of the prismatic fixtures is much higher than it is with fluorescents."

Despite the cost benefit, Waccamaw's main goal in installing the prismatics was to bring out the true colors of the merchandise—particularly the linens—"to make them more attractive to our customers and ultimately increase sales," he says.

Waccamaw, based in Myrtle Beach, S.C., is a chain of 22 stores in the Southeast and Midwest which feature categories such as glassware and cooking accessories, wicker and brass items, pottery, silk flowers, toys and linens.

Most stores are located in regional malls, and average 75,000 sq. ft. The company's sales for 1989 are estimated at $184 million.

In the 100,000-sq.-ft. Knoxville store, Waccamaw installed Holophane Prismalume luminaires in the base retail area, with PrismGlo fixtures at the retail perimeters and over the cash registers.

Eliminates 'cavern': The Prismalumes are integrally ballasted high-intensity discharge prismatic glass reflector luminaires designed to create a uniformly-lighted environment in a range of low to medium mounting heights. The fixtures provide 20% uplight to reduce ceiling contrast and eliminate the "cavern" effect that can occur in large areas.

The PrismGlo fixtures provide 60% uplight, which is meant to create better vertical to horizontal balance.

As Reynolds explains it, the prismatic fixtures have a very thick glass that helps them distribute light better. "If we had used fluorescent lighting in a store like this with an open ceiling, it would have required dropping the fixtures very low to the floor, which wouldn't have looked good."

With the prismatic fixtures, he says, "We like the control we have over the lighting, and the way the light is distributed," Reynolds says. "There are no dark spots on the ceiling, the walls, or the floor. Light goes up and then is redistributed down at different angles."

***Waccamaw opted** for prismatic glass fixtures as an alternative to fluorescents.*

	Discount	Drug	Supermarket	Department	Home Center	Apparel Specialty
Lighting	$ .94	$1.07	$ .96	$1.03	$ .81	$ 1.92
Fixtures	9.30	7.88	13.17	9.93	5.83	11.25
Flooring	1.75	1.69	1.56	3.61	1.07	3.49
Ceilings	1.07	1.50	2.02	2.80	1.08	2.39
Roofing	1.53	2.31	2.61	2.22	1.84	N.A.
Floor maintenance	.21	.62	.69	.48	1.06	N.A.
HVAC	1.36	1.93	1.60	1.21	1.44	N.A.
Interior signage	.32	.56	.41	.29	.31	.83

N.A. = Not Asked
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

With fluorescents, "You can't really direct light to the ceiling. Light goes straight down, so you get a concave effect where the ceiling is dark."

When a store has a dark ceiling, he says, it has the appearance of being a dark store, even if it's very bright on the floor. "If the ceiling is bright, it lights the whole store up. You can actually have less illumination on the store, but it appears to the human eye like it's more."

The Waccamaw stores have white open-end ceilings, and white walls with a strip of blue signage that identifies individual departments. The floors are concrete with urethane coating. The white ceiling base helps direct light up and down, and distributes light better on the floor area, Reynolds says.

Mounted 20 ft. on center, the Prismalumes are at approximately 16 ft. heights, with the PrismGlos at 14 ft. heights.

Reynolds says vertical lighting uniformity is particularly critical on the store walls, where the merchandise bins are actually taller than on the rest of the floor. PrismGlo, he says, directs light vertically on the bins so there is no need for supplemental fluorescent lighting, except under the gazebos.

Although Holophane luminaires were originally intended for retail areas, Reynolds says Waccamaw likes the quality so much that PrismGlos have been installed in the company's warehouses, where a wide distribution of light is required.

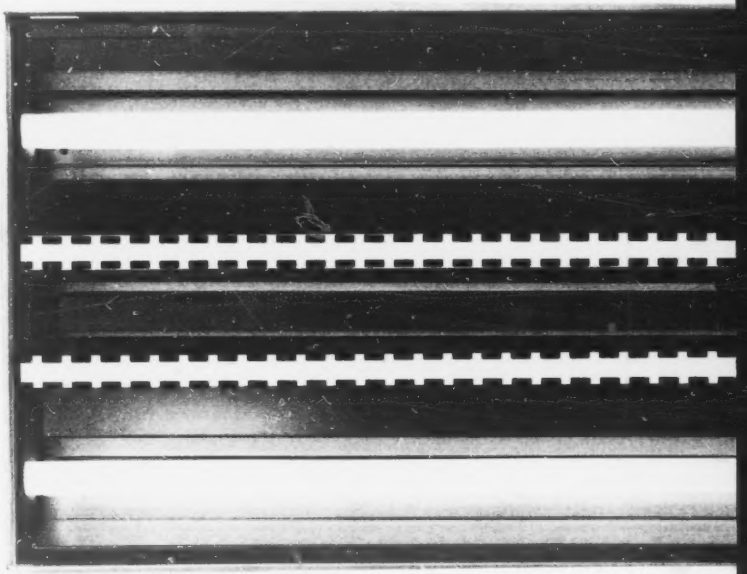
Waccamaw has devised a routine relamping schedule to replace the 400-watt metal halide prismatic lamps before their illumination levels begin to decline, Reynolds says. The average length of time for relamping is two and a half years, comparable to the replacement time for fluorescents.

Average lifespan for physical support systems (mean years)

	Discount	Drug	Supermarket	Department	Home Center	Apparel Specialty
Lighting	15	12	14	10	11	9
Fixtures	11	13	11	8	11	8
Flooring	11	11	12	8	13	6
Ceilings	15	14	13	21	13	10
Roofing	18	14	14	17	16	N.A.
Floor maintenance	7	6	8	7	10	N.A.
HVAC	15	12	16	18	13	N.A.
Interior signage	7	5	9	5	6	4

N.A. = Not Asked
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

Cut Costs, Not Lighting.



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Reynolds says Waccamaw relamps whole groups of fixtures whenever they reach 80% of their life expectancy. "It's cheaper to do the relamping all at once, rather than one by one. The mortality rate variance is minimal.

"Also, it's very important with these types of lamps that you don't lose a light. You have fewer fixtures, so one lamp going out has a big effect on your overall presentation than would be the case with fluorescents, where you have more fixtures."

No other maintenance is performed on the prismatics, since their design makes dust accumulation minimal, he says.

Waccamaw intends to use the prismatic luminaires in all of its new stores. The company's goal is to open 6-8 new stores a year during the next 3-6 years.

"We feel the prismatic glass fixtures really highlight both the stores and the merchandise," says Reynolds. "Customers have commented that even from the outside of the facilities, they have been awed by the overall appearance of the stores." ■

UPBEAT IMAGE FOR KIDS STORE

BOLD COLORS ACCENT WARD'S FUN CONCEPT

There is nothing quiet about Montgomery Ward's Kids Store. From the colorful, striped awning outside to the bold interior signage, Kids Store is marked by a lively and fun atmosphere. The design and ambience reflect the store's contemporary fashion image.

"This is an exciting concept for us, and it was important that everything work together to explain what Kids Store is all about," says Robert Frechette, vp/gmm, children's apparel, Montgomery Ward.

Kids Store is an integral part of Ward's value-driven specialty store positioning. It made its debut in 1988 as an in-store shop and is now in place in nearly 300 Ward stores.

The company expanded the concept in 1989 with the addition of six freestanding Kids Stores in the Chicago area. Although Ward refuses to comment on any future store openings, management says it is pleased with performance to date.

"The stores are meeting our expectations," says David Barnes, director of Kids Store.

With an average of approximately 12,000 sq. ft., Kids Store features infants' and children's clothing and accessories from birth to age 12.

"Kids Store is positioned below the department stores and chains, but above the discounters," says Frechette. "Our merchandise assortment, which is a good mix of fun fashion and basics, and competitive pricing reflect that positioning."

Lively atmosphere: Kids Store's contemporary merchandise is matched by its lively decor and upbeat ambience. Video screens and specially-designated "play stops" are located throughout.

A tiled racetrack aisle directs traffic through the store. Carpeting is used in the merchandise areas.

Atlanta-based Abrams, a subsidiary of Abrams Industries, manufactured nearly all of the fixtures and hardware used at Kids Stores. Another subsidiary, Abrams Construction, executed the construction.

"The two divisions formed a joint partnership in order to produce a complete turnkey package for Ward," says John Elgin, vp-sales and marketing, Abrams Fixture. "By working as a team, we were able to streamline and coordinate what is traditionally a fragmented process."

According to Elgin, the fixturing was directly impacted by the coordinated way in which Kids Store was put together.

"The unique aspect of the fixturing is that it was conceived as part of the overall design of the store," Elgin adds. "Consequently, all of the fixtures were designed with the necessary installation and construction requirements as well as merchandise requirements."

Ease of installation was an important priority. "These fixtures literally snap together," says Elgin. "It only takes us about one day to put the center floor together. The entire store can be set up and made ready for merchandise in about one week."

Colorful design: With their striking design and bright colors, the fixtures complement and enhance Kids Store's lively atmosphere. Among the most eye-catching are bright yellow wire grids that are hung on the walls and used as merchandise frames.

"We hang the grid off a tube that is bound to the wall as part of the decor," says Elgin. "It's a bold look and it makes for a powerful merchandising statement."

Linear fixturing with head-on feature racks on the aisles is also featured. Instead of the traditional 48-in. display modules, Abrams used 42-in. forms.

"The 42-in. module lends itself much better to face out display groupings," says Elgin.

A metal system is used to delineate the various departments. The metal tube is painted gold with blackberry highlights. The upfront cash wrap and service counter features white plastic laminate with blackberry stripes.

In a switch from the traditional backroom location, the store manager's office is located in this highly visible spot. A raised platform allows the manager to have a complete overview of the store.

Colorful in-store signage provides strong brand name and category delineation.

"We have made the store as easy to shop as possible," says Elgin. "The signage is very eye-catching and it clearly identifies each department."

The fixturing, along with the signage, create a highly effective merchandising environment that is bright and appealing, adds Elgin. ■

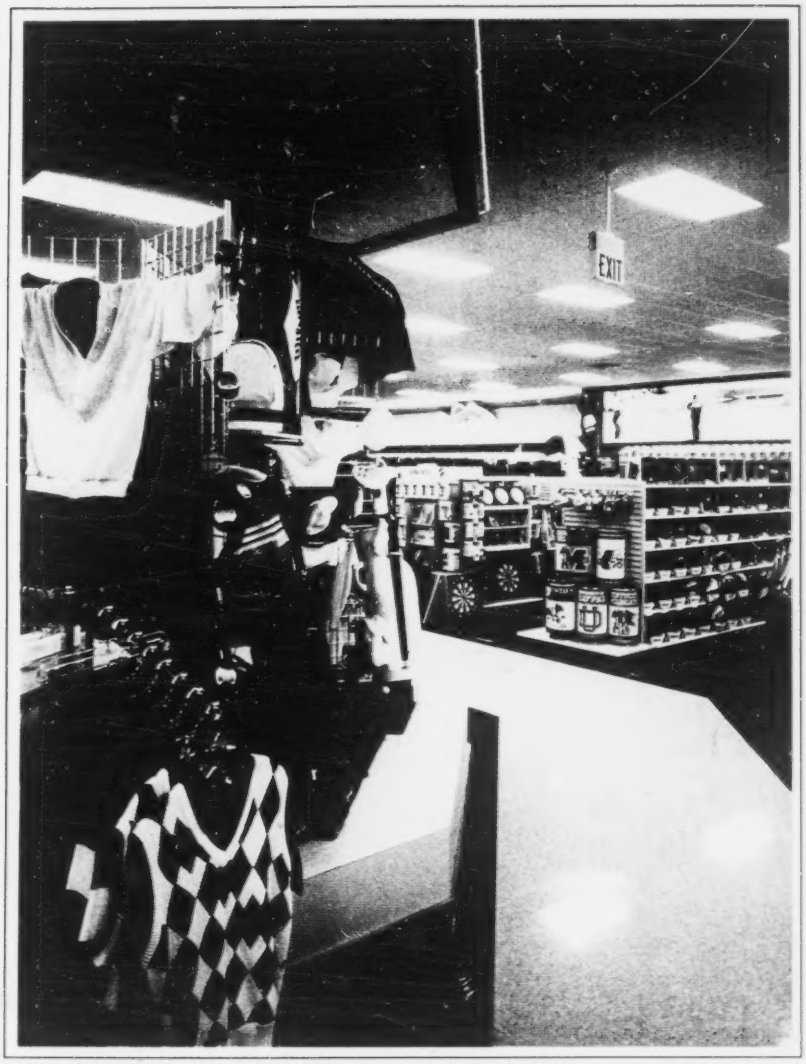
Types of fixtures used

	Discount	Department	Apparel Specialty
Small racks	88.2%	77.3%	65.0%
Large racks	76.5	81.8	80.0
Gondolas	94.1	72.7	25.0
Glass cubes	70.6	81.8	60.0
Show rooms	5.9	50.0	5.0

Note: Totals more than 100% due to multiple responses
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

DESIGN FLEXIBILITY AND EASY MAINTENANCE

MODULAR CARPETING GOES THE DISTANCE AT ALL ABOUT SPORTS



***Heavy-duty traffic** at All About Sports requires tough, yet high-tech, design.*

Van Leunen's believes in sticking with a sure thing. The Cincinnati-based discount retailer has been using modular flooring since 1984. Flexible and easy-to-maintain, the soft flooring is featured throughout the company's stores, including its jazzy All About Sports division.

"Our experience has been that modular carpeting is far superior to traditional carpeting in every way," says Chuck Holland, vp-construction, Van Leunen's. "It wears well and is long-lasting."

Modular flooring is composed of soft tiles. Because the tiles are specifically designed to hug the floor, they can be fixed in place without a permanent adhesive.

"Depending on the particular tile and the layout of the store, we may have to use a special light, non-permanent adhesive in certain areas so that the carpet doesn't shift," says Peter LePage, vp-sales and marketing, Heuga USA. The Cartersville, Ga.-based company provides Van Leunen's with its modular system.

For its six All About Sports stores (the company is investigating additional locations), Van Leunen's selected a tile specifically designed for heavy duty use (FlorS).

"The stores sell a variety of sporting goods, ranging from exercise equipment to sneakers," says Holland. "They needed a floor that would accommodate heavy traffic."

The tile has a high-tech look that complements the store's modern design. The dark charcoal background color of the tile is accented by light gray, red and blue.

"All About Sports stores have a very contemporary look with interior and exterior graphics, bright colors and bold graphics," says Holland. "The flooring is an integral part of the overall design, which lends itself very well to the merchandise on display."

Flexible: Holland is impressed by the design flexibility of modular flooring. "It's easy to change the pattern of the tile and imprint logos and graphics," he says.

> Modular carpeting allows even wear by rotating various sections of tile

LePage says that some retailers create power aisles with modular carpeting by laying red tile for special sale or seasonal events.

"With modular flooring, you are not locked into a set design," he explains. "A retailer can change the appearance of the store at a minimum cost through easily installed borders, accent areas or feature presentation areas."

According to Holland, modular flooring has a number of other advantages not found in most conventional broadloom carpet products. Chief among these are reduced maintenance costs and cost-effective replacement.

"With modular carpeting, we only have to replace the areas that need replacement," says Holland. "Instead of buying a new carpet, we just replace the damaged or stained tile."

This type of selective replacement is more cost-effective than the all-or-nothing replacement of most conven-

Types of flooring used

	Discount	Drug	Super-market	Depart-ment	Home Center	Apparel Specialty
Hardwood	11.8%	—	20.0%	68.2%	10.5%	55.0%
Terrazzo	23.5	20.0%	30.0	36.4	15.8	15.0
Carpet	76.5	70.0	15.0	90.9	31.6	80.0
Quarry tile	17.6	15.0	50.0	50.0	10.5	35.0
Vinyl	35.3	65.0	55.0	68.2	68.4	70.0
Concrete	29.4	30.0	45.0	36.4	63.2	25.0
Marble	—	—	—	72.7	—	25.0
VAT	—	5.0	15.0	36.4	10.5	10.0

Note: Totals more than 100% due to multiple responses
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

tional hard-surface floors, Holland adds. Modular carpeting also allows retailers to promote even wear by rotating various sections of tile.

"Approximately 80% of carpet wear takes place in only 20% of the floor," says LePage. "Rotation allows a retailer to distribute the wear and tear of customer traffic more evenly over the entire surface. It improves overall appearance and extends the life of the floor by as much as 40%."

"The flooring in some of our stores has experienced almost seven years of wear and it is still looking good," he says. "In fact, we expect to get another seven years out of it."

Easy to maintain: Unlike other flooring systems which often require expensive outside services for maintenance, modular tile can be maintained in-house, says LePage. In addition, very little downtime is required for carpet refurbishment.

"Retailers are able to replace portions of their floors during normal store hours," he adds. Modular flooring is installed later in the construction cycle than traditional floors.

"Our product can even be put down after the fixtures are installed, which eliminates the risk of the carpet's being exposed to soiling and damage from construction," LePage says. "Because it can be installed very precisely, you only buy for the areas that need floor covering. Modular carpet tiles have a much lower waste factor than traditional flooring."

LePage admits that modular tile has a higher initial acquisition cost than traditional systems. That fact has not stopped Van Leunen's from installing modular tiles in all its stores.

"It's the only type of carpeting we use," says construction vp Holland. "It is more expensive at the outset, but it definitely pays for itself over time. Given its cost-effectiveness and design flexibility, I'm surprised that more retailers aren't using modular flooring." ■

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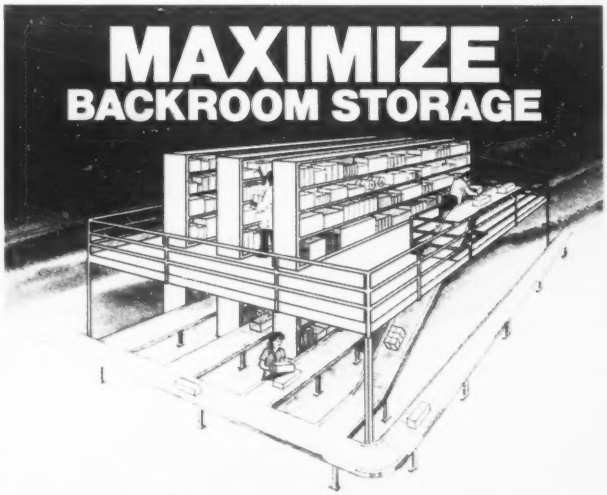

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SHOE STORE CEILING DESIGN IS LOOKING UP

ATHLETE'S FOOT USES TWO DIFFERENT SYSTEMS FOR ITS HIGH-TECH IMAGE

Adding visual interest to a store ceiling is never an easy feat. The effort is especially challenging for shoe store retailers whose primary focus is to get customers to look down, not up.

The Athlete's Foot is known for its bright red running track that places an emphasis on floor-level footwear. But to attract passing shoppers into the chain's enclosed mall locations, The Athlete's Foot puts a high priority on fashionable ceilings.

"A lot of retailers ignore ceiling treatments. Our competitors typically use standard ceiling tile," says Rob Lalumia, director of construction for The Athlete's Foot, Atlanta. "Our store has a high-tech look. Ultimately, the ceiling brings the whole store together."

The Athlete's Foot now uses two different ceiling system designs: a cell ceiling system and a screen system. The screen-ceiling system consists of 4-in. panels. These panels define the ceiling plane without sacrificing the spacious feeling of a higher ceiling. They conceal lighting, HVAC and sprinkler systems.

The Athlete's Foot is beginning to make a transition from screen systems to cell systems in every new store or remodel, Lalumia says.

With an average of 30-50 store openings annually, The Athlete's Foot needed a ceiling system that can be quickly and easily installed, Lalumia explains.

"We typically change out the ceiling as a lease-required remodel comes up," Lalumia notes. "Generally, that is how we determine a remodeling timetable for a store. We may remodel earlier if allowed by the landlord.

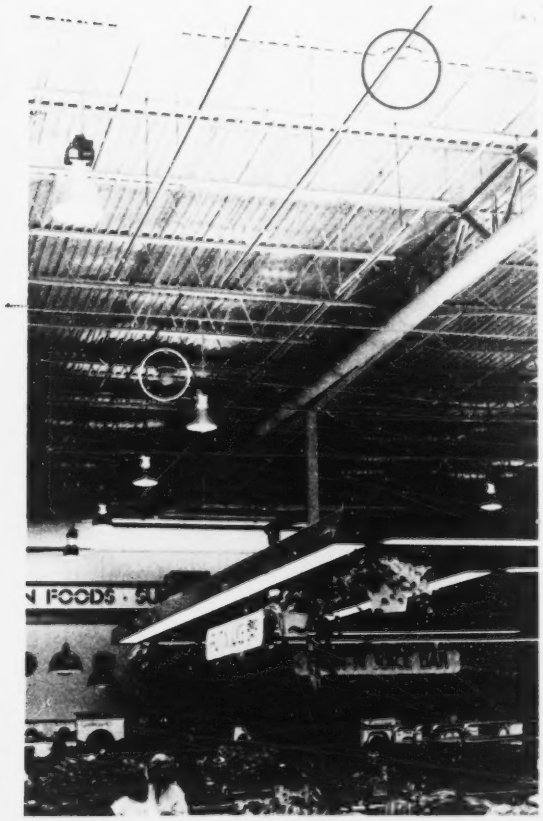
"One of the things that moved us to the cell is that it is a much easier installation than the baffle," Lalumia says. "It lays in like a tile lay-in ceiling. That makes for a much easier installation."

The silver-gray cell creates a smooth, single-plane ceiling. The cell modules effectively mask the plenum area above the ceiling. The open cell structure creates the feeling of a higher ceiling while masking the plenum from any viewing direction.

The Athlete's Foot chose cell sizes that fit in with its typical 1,800-sq.-ft. store. Standard cell sizes range from 3 in. by 3 in. to 24 in. by 24 in.

The two different Athlete's Foot ceiling systems are manufactured by Hunter Douglas Architectural Products, Duluth, Ga.

Lynn Rice, director of sales and marketing for Hunter Douglas, says



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Comments Mr. Hartley on the Sun Foods store, "The Lowell store has approximately 76,000 square feet and is the largest supermarket in New England. It contains 24 checkout counters....

...This store is owned by Hannaford Brothers and they basically have three or four names that they use for different stores. In 1984, they built a store similar to this, with a 22-foot ceiling and at that time we were just completing a new installation at their warehouse, which comprised of twelve 250-watt amplifiers and approximately 80 Soundspheres. Since the ceiling in their new store was going to be 22-feet high, we strongly recommended Soundsphere #110's and guaranteed equal sound in each and every part of the store. This installation was completed; and last year when another store was planned in Lowell, they called us for an installation similar to Keene....

...The size of the store and the use of Soundspheres have caused many supermarket competitors throughout the United States to evaluate this store, and we have received numerous phone calls about the sound system since it works so efficiently and about its clarity where you have all concrete walls, concrete floors and open girders in the ceiling. We have given all of them the same answer that it is very obvious the Soundspheres are the reason for the clarity of sound."

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Types of ceilings used

	Discount	Drug	Supermarket	Department	Home Center	Apparel Specialty
12x12 concealed spline	11.8%	—	—	18.2%	—	10.0%
2x4 lay-in panels	88.2	75.0%	95.0%	63.6	52.6%	65.0
2x2 lay-in panels	5.9	40.0	25.0	54.5	5.3	55.0
Tegular 2x4 lay-in panels	5.9	20.0	5.0	22.7	15.8	35.0
Tegular 2x2 lay-in panels	—	5.0	—	22.7	5.3	35.0
Plaster	5.9	5.0	15.0	22.7	10.5	45.0
Acoustical	29.4	35.0	10.0	40.9	26.3	30.0

Note: Totals more than 100% due to multiple responses
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

that a clip system makes the panels easy to remove and replace. Typically, four small clips suspend the panel. The clips connect to the main runner suspended from a member.

"From a maintenance standpoint, clips keep the ceiling looking the same in alignment for the life of the system," Rice says. The metal cells require little, if any, maintenance. "You are talking vertical surfaces, and typically you don't get a lot of soil collection on a vertical surface," Rice says.

Moreover, "materials can be easily dusted—although I've never seen one that has required it," Rice says.

The only required maintenance occurs above the ceiling, involving the changing of a light fixture, for example. "Or access may be required to gain access to heating and ventilating equipment," Rice says. "You can put that ceiling back in place and make sure it looks good, not tipped or out of alignment."

The cell design is appropriate to renovation projects because the ceiling cells may be combined with an existing grid system.

The Athlete's Foot considers its ceilings to be part of the larger store decor package. "Our store has an international look," Lalumia says, adding that the retailer is owned by Rallye, the retailing conglomerate headquartered in Brest, France.

There are more than 500 corporate and franchise stores internationally. Locations are now in Australia, Asia and Europe and will soon include Canada and Mexico.

Focus groups: To keep its design standards on the leading edge, The Athlete's Foot regularly holds focus group meetings. Participants take an overall look at the chain's store design as well as its merchandise and service, Lalumia says.

"People do identify with the whole look of Athlete's Foot"—including its ceilings, he says.

Rice asserts that the typical lay-in suspension system for 2 ft. by 4 ft. tile "is pretty boring stuff—it is the developer's standard product." He believes a better design is a decorative ceiling.

"A retailer has to establish some sort of identity and attractiveness to bring people into the store," Rice explains.

"Retailers are competing against other shoe retailers. The more attractive the store looks to the people walking by, the more chances you have that people will stop as they walk by. It is called curb appeal."

"A mall is different from a strip center, where people go for a purpose," Rice says. "In a mall, retailers need to spend money to draw people into their store."

Rice continues, "If a retailer is not trying to do something visually different, they are going to go the way of dinosaurs. They may get by without a decorative ceiling. I am not going to tell an account that [installation of] my ceiling is going to increase a store's revenues. Not any one element is going to do it. It has to be the overall visual impact and merchandising scheme. If a retailer is not considering a signature store design, he certainly ought to be looking at one."

The cell ceiling has a long lifespan. "The metal is going to last forever if maintained properly. It is not going to deteriorate," Rice says.

"The issue is how often you go through a store-design cycle. And the ceiling does have some salvage value. It's made out of aluminum which can be recycled, unlike other materials that must go to a landfill. Seventy-five percent of all our materials are recyclable." ■

COOL MOVE: MAN-MADE RAIN

SPRAY SYSTEM KEEPS TEMPERATURES DOWN

Temperatures will be comfortable inside a Venture discount store in Overland, Mo., this summer, thanks to a spray-cooling system installed on the roof.

Two years ago employees complained that interior temperatures sometimes reached 80°F on hot days. Company officials blamed the problem on undersized HVAC mechanical equipment.

Faced with the costly choices of either adding extra HVAC or more roof insulation material, officials chose an unusual third option—a roof-mounted Evaporative Spray Roof Cooling (ESRC) system.

The ESRC system provides an intermittent spray of water as the roof temperature rises during the day. The water cools the roof, resulting in energy savings because air conditioning equipment does not work as hard.

The ESRC system's main components are a digital controller, PVC piping and a proprietary brass sprayhead. Piping is clamped to wood blocks set into the roof surface. The controller monitors the surface temperature and regulates spray rates.

The spray is activated when roof temperatures rise above a predetermined set-point. The hourly spray rate on the roof is less than one-half gallon of water per square foot.

Venture is now determining whether to use ESRC in a second store. While ESRC worked well last summer during its inaugural season, last fall's deactivation created some problems during the winter.

When workers drained the pipes, some vestiges of water remained. The workers were supposed to use an air compressor to blow out the pipes, according to system manufacturer Rainmaker Cooling of Houston. When it came time this past spring to reactivate the system, workers found 12 breaks in the pipes caused by leftover water freezing and expanding.

Meanwhile, Venture's former parent, May Department Stores, St. Louis, is also investigating ESRC technology. Dan Keuss, corporate engineering manager for May, says

he believes ESRC systems would work best in new-store construction as opposed to retrofits.

Regional paybacks: Keuss estimates that the payback period would be about four years for retrofitting an existing May department store in the Midwest with a ESRC system.

May is planning to test ESRC on a new department store in the New England market because "in that particular locale there is a rebate from the local electrical utility," Keuss says.

May is also considering using it on Volume Shoe's distribution center in Topeka, Kan., Keuss says, explaining that "The DC roof is metal and has no insulation."

The key to the Rainmaker ESRC system is its programmable controller that evaluates surface conditions and tracks temperatures. The controller determines how much water will evaporate in a given amount of time and then applies that amount to the roof.

"There is a gridwork of pipe laid out on the roof. We use sprayheads that throw water in a 40-ft. diameter circle. The sprayheads can throw a half-circle or quarter-circle on two sides. They also can throw a 40-ft.-wide stream that is 2 ft. wide between equipment," says Ken Robinson, president of Rainmaker Cooling.

"With the ESRC system, we keep the roof about 5° above the ambient temperature all day," he explains.

For retailers, the evaporative spray roof cooling is relatively inexpensive. "Typically, air-conditioning equipment cost a minimum of $800 a ton, or $1,000 a ton installed," Robinson says.

"I can install a roof-spray system for half the initial cost of air-conditioning equipment. The operating cost is 90% cheaper."

ESRC systems are somewhat controversial. "Roofers are the biggest drawback," Robinson says. "They give warranties and then void them. But it is not water that damages the roof. It is the thermal expansion and contraction that causes roofs to leak. We need enlightened roofers. Keeping the roof near the ambient temperature keeps its expansion and contraction lower." ■

Types of roofing used

	Discount	Drug	Super-market	Depart-ment	Home Center
Single-ply membrane	70.6%	75.0%	45.0%	68.2%	42.1%
Built-up roof	70.6	50.0	55.0	54.5	57.9
Metal	35.3	25.0	20.0	13.6	52.6
Fabric	—	10.0	20.0	4.5	15.8

Note: Totals more than 100% due to multiple responses
Source: *Chain Store Age Executive*/Leo J. Shapiro & Associates

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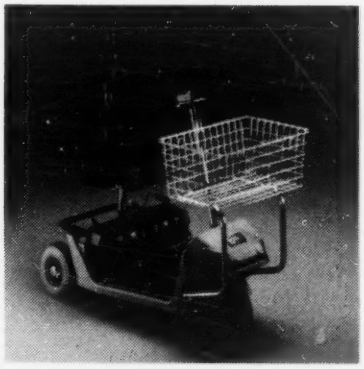
E-Z Shopper

Lark Mini E-Z Shopper



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WOOLWORTH 'RESPONDS' TO SHINIER FLOORS

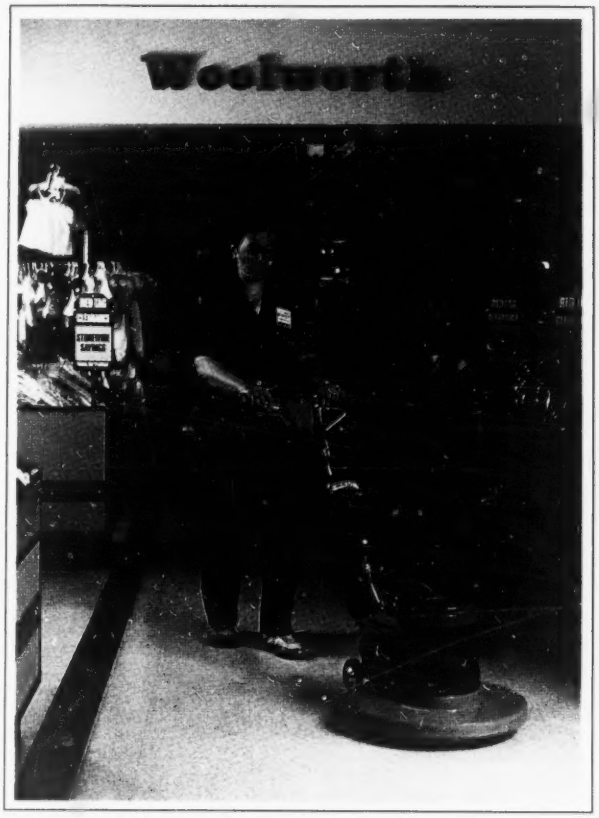
MAINTENANCE SYSTEM UPGRADES LOOKS, CUTS LABOR COSTS

Imagine switching to a floor care system that not only makes the floors look better, but also cuts down on labor costs. New York-based Woolworth managed to do that. The retailer is now using the Respond floor care system to achieve a brighter shine on its tile and terrazzo floors.

"The system has improved the way our stores look, and as far as I'm concerned, it was worth switching to just for that," says Doug Meima, construction buyer, Woolworth.

But Respond has provided an added benefit, he says. "Because of its ease of use and effectiveness, our people actually spend less time buffing and polishing than they used to."

The Respond system, a creation of Tennant Trend, Niagara Falls, involves a Powerline floor machine, two pads and a chemical. "It's like a Simonizer for a car—it cleans and polishes," Meima says.



***Respond's system** requires less buffing and polishing time.*

"Of course, you have to start with a basically good floor that has a good base coat, which means two sealers and three coats of wax. And the maintenance with Respond must be daily," Meima says.

Respond's high speed floor machine delivers the control, weight and speed needed to maximize performance, Meima says. It includes a shock-absorbing clutch-plate system, triple planetary gears, and a torque-reducing offset handle design.

The floor machine operates at 300-400 rpm, with heavy concentrated weight on the pad. Woolworth uses a 20-in. model, which has an average speed of 320 rpm and weighs 102 lb. Because the 20-in. model has a larger radius than the 17-in. model, it has a greater peripheral speed and produces more heat to perform faster.

A pressurized spray attachment is mounted on the machine and emits a wide precision spray pattern that is adaptable to rear or front spray. The spray attachment has a rotational molded polyethylene body, two-liter capacity, and mounts to the machine without tools.

> Key to the system are specially-designed pads and drive assemblies

One-step process: The emulsion contained in the spray attachment is a formulation of solvents, polymers and waxes that deep cleans and refinishes in one step. It has little odor, a high coverage rate, is non-yellowing, and is compatible with most floor finishes.

The polymer floor finish is a hard finish. Like most hard finishes, it has its advantages and its disadvantages.

The advantages are that it makes the floor more durable under foot traffic, gives it a brighter mop-on shine, requires no buffing to enhance the shine, and does not allow soils to embed in the surface. Overall, it requires fewer routine hours to maintain appearance.

The disadvantages of a hard finish are that it can be scratched by abrasive soils, it can be black marked more easily than a soft finish, it is more difficult to remove when required, and it needs spray-buffing or a scrub/recoat to enhance the shine in worn areas.

Because of these disadvantages, the Respond system emulsion also has a natural, or soft, finish. The benefits of this finish negate some of the liabilities of the hard finish. For example, the soft finish helps scratches and black marks buff out easily, is easily removed when required, and offers very little surface resistance when buffing.

Also contained in the emulsion is a water-based cleaner (this attacks the water soluble soils on the floor during application) and an oil-based solvent (which attacks oil-based soils that water won't touch). This mixture of oil and water is the reason why the emulsion must be shaken up before use, assuring that all components are in suspension.

Technically, the emulsion is an all-surface finish. However, quarry tile, asphalt tile, wood and terrazzo floors must be properly sealed before it can be used. The reason is that these floors are porous, and the benefit of the program would be lost in the absorption of the finish.

Key to the system are the pads and pad drive assemblies which are specially constructed for use with Respond. The blue pads lift and actually hold soil—they don't shed soil back onto the floor in the form of dust. They fill evenly across the full surface, rather than glazing on the edges, and can be cleaned after use by applying hot water under pressure.

The green pad is the polish pad, and is used after the blue pad is applied. It delivers shine in a single pass.

The pads have an open weave design and a consistent thickness. They are packaged 10 to a carton. Since color denotes procedure, there is no need for guesswork.

On the high-speed pad driver, a special foam cushion eliminates the wobble that is associated with some high-speed machines. This increases safety and reduces operator fatigue. A spring-loaded shock absorber protects the motor and gearbox, allows easy mount and dismount of the driver, and reduces clutch-plate breakage.

Robert Gorsky, accounts manager, Tennant Trend, says the goal of Respond is a wet-look final appearance, produced through a program that requires a minimum amount of labor.

The goal is also to eliminate the intensive labor/cost requirements of conventional restoration—stripping, scrubbing and recoating, he says. ■

HOME DEPOT KEEPS ITS COOL

PC MONITORING MAINTAINS CPU PERFORMANCE

"From an energy management viewpoint, the No. 1 problem in a mass-merchandising home center is infiltration of outside air," says Jim Laird, corporate energy manager for Home Depot.

Energy management is an especially timely issue for the Atlanta-based warehouse home center retailer. In 1989, Home Depot opened its first unit outside the Sun Belt, in New Jersey.

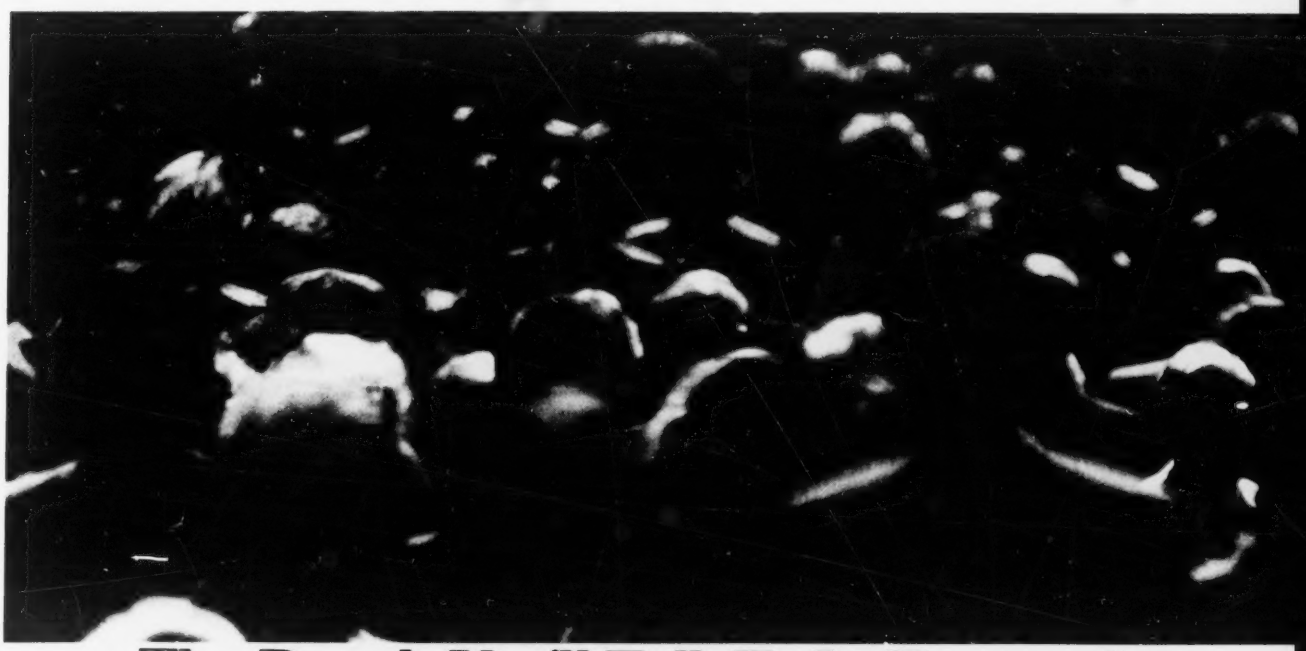
"Control of outside air is more of an issue in the Northeast because of the absolute temperature differential," Laird says.

Most stores have concrete floors and exposed ceilings and range from 67,000 to 140,000 sq. ft. Oversized doors remain open most of the day as forklifts deliver pallets of merchandise to the shelves.

This makes the maintenance of comfortable temperatures a considerable challenge for Home Depot. Home Depot's answer to the temperature dilemma is to add computerized temperature controls to its stores, which average 200 tons of HVAC capability each.

Rooftop HVAC units are controlled by a central processing unit located in each store. Typically, the CPU is situated in the store manager's office or an electrical room. Inside each HVAC unit is a microprocessor module that is linked to the CPU through twisted-pair cables.

PC modem: The CPU is connected to Home Depot's headquarters through a personal computer modem. The on-site CPU and rooftop unit module actually run each HVAC unit on the store rooftop, operating the cooling, heating, fan and outside air dampers.



The People You'll Talk To In Expanding Your Business Could Fill A Book.

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But the home office continually monitors the HVAC unit's CPU performance. A technician stationed at the PC workstation will instantly spot a malfunctioning HVAC unit.

The microprocessor can determine such things as auxiliary temperatures, whether the compressor is on or off and filter differential pressures, which will let the technician know that a filter needs replacing. The automated system even knows if a fan switched to the "on" position is really blowing air.

"Besides maintaining temperature in the store, which saves energy, the automated system feeds back a tremendous amount of information that can be used for equipment maintenance," he says.

Lennox supplies Home Depot with the HVAC rooftop units. The microprocessor modules installed inside the HVAC units are manufactured by Novar Controls, Barberton, Ohio.

A growing number of HVAC manufacturers now offer CPU-guided systems as part of their HVAC rooftop unit systems.

For example, Trane's HVAC rooftop units include a "Tracer 100" microprocessor module which is made by Trane and installed in the unit at the factory.

York International provides microprocessor modules with its rooftop HVAC systems. The modules are manufactured by outside companies including Andover, Honeywell and Johnson Controls.

"The [microprocessor] controllers help with energy management, which saves [the retailer] money in the long run," says Steve Conner, York's director of national account sales.

"Plus, if the controllers are installed at the factory, this avoids the need for the retailer to hire another contractor to install them at the job site after the HVAC units have been placed on the roof," he says.

Carrier uses microprocessor technology in its HVAC rooftop units. The manufacturer's subsidiary, Parker Electronics, Jacksonville, Fla., make microprocessor controls, as does the control division of Hamilton Standard, a sister corporation of Carrier which is owned by United Technologies.

"Microprocessor controls are still an option, but they are becoming more widely used" by retail chains, says Mitch Hammond, national accounts regional sales manager for Carrier.

David A. Robertson, national accounts director for Lennox, says that until relatively recently, in-store temperature control was an inexact science at best. Frequently used mercury-bulb thermostats were designed to allow temperatures to fluctuate up to 5°F.

Moreover, so-called "supervisory" systems would rely on time clocks to determine when HVAC rooftop units should go on and off. Daylight savings and power outages would require that the clock be reset, but the store manager would not know how to do it.

Robertson says as a result, "the time clock was bypassed so it

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wouldn't interfere with operations, and the retailer lost its energy savings."

Because electric utilities charged for electricity usage and peak-demand usage, retailers would try to save electricity by limiting electrical demand to a pre-set maximum amount.

In other words, HVAC rooftop units would shut off to limit electrical demand and then the store would get too hot or too cold and the customers would leave, Robertson says.

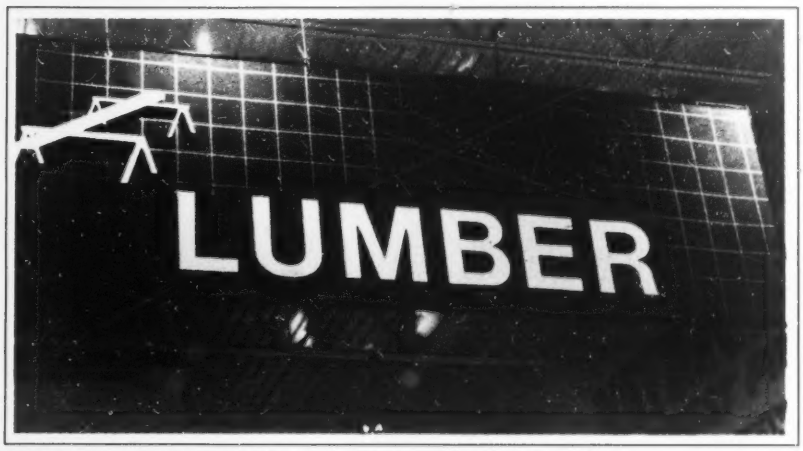
Those situations will not occur under the new era of PC store monitoring, Laird says. He underscores the fact that the store automated system is running on its own.

"Store people are not engineers," he says. "Their job is to be merchandisers, and we don't want them to worry about the lights and air conditioning. The [automated] system provides intelligence that can be monitored and controlled from the home office."

Laird says the system is "intelligent enough to call me and I can preempt the problem before the store even knows about it. We can take a printout of a store [with malfunctioning HVAC equipment] and fax the printout to our service company. The serviceman will then know exactly which A/C unit needs servicing." ■

3-D SIGNS AT PERGAMENT

GRAPHICS PROJECT UPSCALE IMAGE



***Letters and graphics combine** for easy department identification.*

To convey a low-price image, many warehouse home centers use plain vinyl or cloth signs and banners. Pergament Home Centers, in contrast, uses three-dimensional graphics to produce high-tech signs that set the retailer apart from its competitors. Each giant-size sign measures 4 ft. by 12 ft.

The Melville, N.Y.-based retailer has placed large signs in more than a dozen of its 40 units. Remaining stores will be retrofitted with the new sign program, says Stanley Nowaski, director of store development.

An unconventional aspect of Pergament's sign program is that every sign contains three-dimensional graphic representations of the product category. A sign for wallcoverings includes a partly unwound wallpaper roll, for example.

"The combination of letters with graphic representation definitely makes departmental recognition easier and quicker," Nowaski asserts.

The immediate recognition of a department helps create a cross-merchandising environment, says Bill Levine, vp-sales for Electra Display, the Ronkonkoma, N.Y., company that produced the signs.

The large signs tie in with other decor elements including fixtures and displays originally conceived by Russell Sway Designers. Sign letters are white on a blue background. Surrounding gridwork is gray.

"Dimensional signing," Levine says, "is the least expensive way to change the image of a store without having to do major construction."

More feeling: Three-dimensional graphics bring much more feeling to a store environment than flat paper signs, Levine adds. "If you wanted to make a store more aesthetically satisfying, dimensional signs do a better job than non-dimensional signs."

The large signs were first installed in Pergament's Garden City Park unit. Later, the signs were installed in eight Pergament Super Home Centers and another eight existing conventional Pergament store.

"We also plan to renovate three-fourths of our existing stores in the next 12 months and we will include these signs as an integral part of the remodeling process," Nowaski says.

The illustrations help stimulate quick recognition as well as add a touch of light artistry to the decor, Nowaski says. A grid design and blue-and-white color combinations have been duplicated on the endcaps and merchandise price signs. The design is also being incorporated into checkout signs, Nowaski adds.

"Electra worked with us in making subtle design changes that have produced dramatic cost savings without changing the visual presentation that we have developed," he says.

Cloth or vinyl banners of equal size, although less expensive materials, show little cost savings over Pergament's signs, "especially when you factor in the shorter lifespan of banners," Nowaski says.

Pergament is continuing to find ways beyond signs to give self-service assistance to customers. "We are currently testing store directory maps in four of our locations," Nowaski says.

In producing the signs, Electra wanted customers to be able to "read the signs from one side of the store to another," Levine says.

"Cross-selling is a major part of a departmentalized store," Levine explains. "Cross-selling gets a person from one department to another. If they came into Pergament for a rake, they should see a sign for a hammer and subliminally be reminded that they need to buy some nails. The signs are intended to keep customers in the store a few minutes longer."

The lumber cashier sign features a graphic of a sawhorse. For the electrical department, Electra built a giant three-dimensional plug. For the paint department, Electra made a large paint can with a paint brush. Red paint drips from the brush. For flooring, a checkerboard pattern was made using actual tiles. ■

SALES

	1st qtr. (000 omitted)	% change	YTD (000 omitted)	% change
CATALOG STORE CHAINS				
J.C. Penney†	3,801,000	+ 6.3	3,801,000	+ 6.3
Sears, Roebuck & Co.	6,840,100	+ 1.3	6,840,100	+ 1.3
DEPARTMENT STORES				
Carter Hawley Hale[3]*	590,871	– 0.8	2,234,500	+ 4.6
Dillard	742,382	+ 24.1	742,382	+ 24.1
Gottschalks	52,568	+ 21.2	52,568	+ 21.2
Jacobson's	89,942	+ 4.1	89,942	+ 4.1
R.H. Macy[3]	1,486,344	+ 0.2	5,636,879	+ 4.7
May*	2,188,000	+ 10.7	2,188,000	+ 10.7
Mercantile*	494,061	+ 3.2	494,061	+ 3.2
Neiman Marcus Group[3]	370,778	+ 8.2	1,310,930	+ 16.7
Nordstrom	555,038	+ 8.4	555,038	+ 8.4
Strawbridge & Clothier	209,249	+ 9.8	209,249	+ 9.8
Younkers	60,745	– 2.9	60,745	– 2.9
DISCOUNT STORES				
Consolidated	140,020	+ 6.4	140,020	+ 6.4
Dollar General	133,766	+ 3.0	133,766	+ 3.0
Dayton Hudson*	3,007,000	+ 6.4	3,007,000	+ 6.4
Hills	452,800	+ 13.8	452,800	+ 13.8
Jamesway	187,119	+ 15.6	187,119	+ 15.6
K mart	7,044,200	+ 16.1	7,044,200	+ 16.1
Pic n' Save	118,966	+ 26.4	118,966	+ 26.4
Rose's	353,311	+ 7.9	353,311	+ 7.9
Service Merchandise	625,447	+ 10.6	625,447	+ 10.6
Wal-Mart	6,768,195	+ 26.0	6,768,195	+ 26.0
SHOE/SPECIALTY CHAINS				
Brown Group	438,663	+ 0.5	438,663	+ 0.5
Edison Bros.	248,000	+ 15.5	248,000	+ 15.5
Melville	1,617,839	+ 5.8	1,617,839	+ 5.8
Woolworth	2,065,000	+ 10.0	2,065,000	+ 10.0
APPAREL CHAINS				
Banker's Note	13,147	+ 34.4	13,147	+ 34.4
Charming Shoppes	191,761	+ 11.3	191,761	+ 11.3
Deb Shops	42,546	+ 2.4	42,546	+ 2.4
The Gap	402,368	+ 29.8	402,368	+ 29.8
Paul Harris	49,327	+ 5.1	49,327	+ 5.1
The Limited	1,107,345	+ 14.8	1,107,345	+ 14.8
Merry-Go-Round	120,967	+ 63.6	120,967	+ 63.6
One Price Clothing	21,761	+ 47.8	21,761	+ 47.8
Petrie	301,459	+ 8.0	301,459	+ 8.0
OFF-PRICE APPAREL				
Burlington Coat Factory[3]	159,017	+ 5.5	647,670	+ 15.4
Dress Barn[3]	70,645	+ 18.2	208,331	+ 13.5
Ross	169,672	+ 10.2	169,672	+ 10.2
S&K	15,035	+ 21.0	15,035	+ 21.0
Syms	65,330	+ 8.0	65,330	+ 8.0
TJX†*	513,757	+ 10.2	513,757	+ 10.2
WAREHOUSE WHOLESALE CLUBS				
Bizmart[4]	45,123	+203.8	132,793	+295.4
Office Club	63,987	+118.1	63,987	+118.1
Office Depot*	142,627	+124.6	142,627	+124.6
Staples*	63,504	+ 70.3	63,504	+ 70.3
Waban	546,124	+ 18.9	546,124	+ 18.9
Warehouse Club[2]	61,100	– 1.8	133,868	– 2.2
Wholesale Club	152,289	+ 41.8	152,289	+ 41.8

EARNINGS

	1st qtr. (000 omitted)	% change	YTD (000 omitted)	% change
CATALOG STORE CHAINS				
J.C. Penney†	154,000	+ 4.1	154,000	+ 4.1
Sears, Roebuck & Co.	(37,400)	NA	(37,400)	NA
DEPARTMENT STORE CHAINS				
Carter Hawley Hale[3]*	(6,640)	NA	10,020	– 31.9
Dillard	29,390	+ 50.1	29,390	+ 50.1
Gottschalks	255	– 27.4	255	– 27.4
Jacobson's	1,131	– 45.5	1,131	– 45.5
R.H. Macy[3]	(63,121)	NA	(135,283)	NA
May*	80,000	+ 25.0	80,000	+ 25.0
Mercantile*	25,801	– 4.6	25,801	– 4.6
Neiman Marcus Group[3]	4,036	– 14.1	34,429	– 20.9
Nordstrom	13,169	– 42.7	13,169	– 42.7
Strawbridge & Clothier	3,090	+ 98.2	3,090	+ 98.2
Younkers	(3,655)	NA	(3,655)	NA
DISCOUNT STORES				
Consolidated	(3,721)	NA	(3,721)	NA
Dollar General	390	NA	390	NA
Dayton Hudson*	58,000	+ 45.0	58,000	+ 45.0
Hills	(16,952)	NA	(16,952)	NA
Jamesway	(997)	NA	(997)	NA
K mart	100,100	+ 6.4	100,100	+ 6.4
Pic n' Save	5,936	+ 9.6	5,936	+ 9.6
Rose's	2,073	+ 66.4	2,073	+ 66.4
Service Merchandise	(15,507)	NA	(15,507)	NA
Wal-Mart	253,443	+ 27.8	253,443	+ 27.8
SHOE/SPECIALTY CHAINS				
Brown Group	8,742	+ 19.5	8,742	+ 19.5
Edison Bros.	7,500	+ 27.1	7,500	+ 27.1
Melville	7,811	– 67.8	7,811	– 67.8
Woolworth	38,000	+ 5.6	38,000	+ 5.6
APPAREL CHAINS				
Banker's Note	277	+ 49.7	277	+ 49.7
Charming Shoppes	6,976	+ 1.2	6,976	+ 1.2
Deb Shops	650	– 25.4	650	– 25.4
The Gap	21,154	+ 40.5	21,154	+ 40.5
Paul Harris	(371)	NA	(371)	NA
The Limited	62,315	+ 37.9	62,315	+ 37.9
Merry-Go-Round	6,615	+297.1	6,615	+297.1
One Price Clothing	(138)	NA	(138)	NA
Petrie	7,431	+ 5.6	7,431	+ 5.6
OFF-PRICE APPAREL				
Burlington Coat Factory[3]	(1,860)	NA	28,910	+ 8.1
Dress Barn[3]	3,960	+ 6.5	10,148	– 25.7
Ross	1,568	– 53.9	1,568	– 53.9
S&K	488	+ 26.0	488	+ 26.0
Syms	1,779	– 25.6	1,779	– 25.6
TJX†*	14,600	+ 8.1	14,600	+ 8.1
WAREHOUSE WHOLESALE CLUBS				
Bizmart[4]	425	NA	(1,236)	NA
Office Club	709	NA	709	NA
Office Depot*	2,904	+ 88.1	2,904	+ 88.1
Staples*	1,891	+ 57.5	1,891	+ 57.5
Waban	1,415	– 78.3	1,415	– 78.3
Warehouse Club[2]	(971)	NA	(665)	NA
Wholesale Club	786	NA	786	NA

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[1]first quarter figures
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[4]fourth quarter figures
Source: Company reports

SALES

	1st qtr. (000 omitted)	% change	YTD (000 omitted)	% change
HARD LINES CHAINS				
Blockbuster Ent.	139,150	+ 80.7	139,150	+ 80.7
Child World	130,054	– 1.2	130,054	– 1.2
Claire's	53,520	+ 55.9	53,520	+ 55.9
Crown Books	44,723	+ 12.1	44,723	+ 12.1
Fabri-Centers	80,138	+ 8.1	80,138	+ 8.1
Fretter	42,400	– 12.4	42,400	– 12.4
Good Guys[2]	62,495	+ 48.2	149,844	+ 48.4
Highland	185,314	– 5.7	185,314	– 5.7
House of Fabrics	86,419	+ 8.7	86,419	+ 8.7
Lechters	33,167	+ 22.5	33,167	+ 22.5
Lionel	65,689	+ 7.2	65,689	+ 7.2
Newmark & Lewis	52,270	+ 5.2	52,270	+ 5.2
Oshmans	70,075	+ 16.1	70,075	+ 16.1
Pep Boys-M,M,J	213,034	+ 19.5	213,034	+ 19.5
Pier 1 Imports[4]	136,724	+ 22.4	516,858	+ 24.7
Tandy[3]	1,013,548	+ 7.4	3,456,113	+ 5.3
Toys 'R' Us	944,802	+ 23.1	944,802	+ 23.1
Trak Auto	67,575	+ 12.7	67,575	+ 12.7
Trans World Music*	70,866	+ 8.4	70,866	+ 8.4
SUPERMARKETS				
Bruno's[3]*	640,889	+ 10.3	1,814,983	+ 12.2
Delchamps[3]	231,413	+ 3.3	701,556	+ 4.6
Giant Food	769,264	+ 6.2	769,264	+ 6.2
Food Lion	1,201,285	+ 18.8	1,201,285	+ 18.8
Hannaford Bros.*	393,919	+ 13.2	393,919	+ 13.2
Kroger	4,558,759	+ 1.5	4,558,759	+ 1.5
Marsh[4]	234,690	+ 13.4	992,306	+ 10.9
Penn Traffic	697,573	+ 37.1	697,573	+ 37.1
Ralphs	620,900	+ 8.5	620,900	+ 8.5
Safeway	3,336,000	+ 3.4	3,336,000	+ 3.4
Smith's Food & Drug	487,745	+ 22.2	487,745	+ 22.2
Village Super Markets[3]	162,640	+ 3.6	476,524	+ 4.2
Vons*	1,211,700	– 2.6	1,211,700	– 2.6
Weis Markets	313,971	+ 4.1	313,971	+ 4.1
Winn-Dixie[3]	2,300,000	+ 6.2	7,500,000	+ 6.7
CONVENIENCE STORES				
Dairy Mart Convenience	133,955	+ 7.2	133,955	+ 7.2
National Convenience[3]*	249,302	+ 4.2	782,323	– 0.5
Southland*	1,940,000	+ 2.1	1,940,000	+ 2.1
Uni-Marts[2]	57,477	+ 12.4	114,925	+ 17.2
DRUG STORES				
Arbor[3]	82,799	+ 12.3	252,468	+ 13.6
Big B	122,898	+ 16.3	122,898	+ 16.3
Block Drug[4]	114,828	+ 6.1	433,605	+ 5.9
Drug Emporium[4]	137,417	+ 21.9	491,652	+ 20.9
Fay's*	153,194	+ 16.8	153,194	+ 16.8
Genovese*	128,578	+ 13.4	128,578	+ 13.4
Longs	537,426	+ 9.1	537,426	+ 9.1
Perry[2]*	158,421	– 0.5	337,511	– 1.8
Walgreen[2]	1,646,602	+ 11.5	3,033,406	+ 12.8
HOME CENTERS				
Grossman's	156,935	– 28.5	156,935	– 28.5
Hechinger*	345,730	+ 25.0	345,730	+ 25.0
Home Depot	880,856	+ 37.3	880,856	+ 37.3
Lowe's	720,900	+ 19.7	720,900	+ 19.7
NON-STORE RETAILERS				
Lands' End	112,191	+ 3.8	112,191	+ 3.8
QVC Network	161,272	+ 207.3	161,272	+ 207.3
Spiegel	389,864	+ 19.9	389,864	+ 19.9
Lillian Vernon[4]	42,322	+ 9.9	154,687	+ 10.0

EARNINGS

	1st qtr. (000 omitted)	% change	YTD (000 omitted)	% change
HARD LINES CHAINS				
Blockbuster Ent.	13,449	+ 82.0	13,449	+ 82.0
Child World	(7,415)	NA	(7,415)	NA
Claire's	3,205	+ 68.1	3,205	+ 68.1
Crown Books	1,512	+ 0.9	1,512	+ 0.9
Fabri-Centers	628	+ 19.8	628	+ 19.8
Fretter	(1,204)	NA	(1,204)	NA
Good Guys[2]	1,122	+ 96.5	4,743	+ 72.3
Highland	(6,684)	NA	(6,684)	NA
House of Fabrics	2,154	+ 60.9	2,154	+ 60.9
Lechters	293	+ 92.8	293	+ 92.8
Lionel	(5,983)	NA	(5,983)	NA
Newmark & Lewis	(1,146)	NA	(1,146)	NA
Oshmans	(877)	NA	(877)	NA
Pep Boys-M,M,J	9,440	+ 23.8	9,440	+ 23.8
Pier 1 Imports[4]	6,723	– 7.8	5,677	– 0.2
Tandy[3]	53,034	– 20.5	233,421	– 12.5
Toys 'R' Us	33,228	+ 22.4	33,228	+ 22.4
Trak Auto	925	+ 213.6	925	+ 213.6
Trans World Music*	2,449	+ 32.7	2,449	+ 32.7
SUPERMARKETS				
Bruno's[3]*	15,468	+ 21.8	44,494	+ 23.7
Delchamps[3]	3,446	– 9.2	9,214	+ 42.1
Giant Food	28,467	+ 7.3	28,467	+ 7.3
Food Lion	37,129	+ 29.3	37,129	+ 29.3
Hannaford Bros.*	9,824	+ 14.5	9,824	+ 14.5
Kroger	(10,265)	NA	(10,265)	NA
Marsh[4]	1,698	+ 6.2	10,723	+ 25.9
Penn Traffic	(12,280)	NA	(12,280)	NA
Ralph's	(4,008)	NA	(4,008)	NA
Safeway	15,000	+ 70.5	15,000	+ 70.5
Smith's Food & Drug	8,139	+ 43.3	8,139	+ 43.3
Village Super Markets[3]	866	– 13.8	3,769	– 13.3
Vons*	8,200	NA	8,200	NA
Weis Markets	18,980	– 7.0	18,980	– 7.0
Winn-Dixie[3]	42,000	+ 12.3	108,900	+ 18.1
CONVENIENCE STORES				
Dairy Mart Convenience	234	NA	234	NA
National Convenience[3]*	(6,204)	NA	535	NA
Southland*	(121,500)	NA	(121,500)	NA
Uni-Marts[2]	501	– 14.8	1,342	– 5.5
DRUG STORES				
Arbor[3]	2,269	+ 15.5	8,326	+ 24.4
Big B	395	– 82.5	395	– 82.5
Block Drug[4]	11,846	+ 7.0	46,140	+ 6.1
Drug Emporium[4]	2,676	– 13.4	8,206	+ 2.8
Fay's*	1,476	+ 8.9	1,476	+ 8.9
Genovese*	816	– 27.1	816	– 27.1
Longs	14,801	+ 2.6	14,801	+ 2.6
Perry[2]*	604	– 16.3	3,637	– 26.2
Walgreen[2]	61,935	+ 8.1	90,597	+ 10.4
HOME CENTERS				
Grossman's	(5,363)	NA	(5,363)	NA
Hechinger*	8,387	+ 14.8	8,387	+ 14.8
Home Depot	38,617	+ 48.9	38,617	+ 48.9
Lowe's	22,000	+ 50.7	22,000	+ 50.7
NON-STORE RETAILERS				
Lands' End	1,702	– 63.8	1,702	– 63.8
QVC Network	(5,844)	NA	(5,844)	NA
Spiegel	7,763	+ 22.5	7,763	+ 22.5
Lillian Vernon[4]	3,117	+ 23.6	10,806	+ 32.6

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